



SPOE Re-Organization Implementation Guide

Central Finance Office
January 5, 2006

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1. IMPLEMENTATION GUIDE AUDIENCE

The Guide's primary audience is those organizations that represent new, existing and, possibly, discontinued SPOE organizations and staff members.

St. Louis County SPOE, Greater St. Louis SPOE, Northwest SPOE or DMH.: This Guide does not apply except for Items 2, B and C below.

The Guide represents implementation guidelines and requirements from the Central Finance Office. Other State requirements may exist beyond what is contained within this Guide. This Guide solely pertains to the Central Finance Office requirements to successfully operate the SPOE within the CFO framework, the old SPOE software and www.mofirststeps.com beginning February 1, 2006.

It is recommended that each SPOE/Agency review this Guide in its entirety - even if you feel that certain sections do not apply to your SPOE.

2. MISCELLANEOUS AND GENERAL INFORMATION

The Guide is organized around new, existing and discontinued SPOEs. The following general information may be pertinent to all applicable agencies.

A. Is my SPOE considered new, existing or discontinued?

(1) New: any SPOE agency that did not have an existing SPOE prior to February 1, 2006.

A new SPOE is also considered any organization that changed its tax ID. For example, "SPOE X" has existing Region A. Their tax ID is 12-3456789. During the SPOE re-bid, "SPOE X" submitted their SPOE RFP response with tax ID 98-7654321. For CFO purposes only, this is considered a new SPOE.

(2) Existing: any SPOE agency that served a previous SPOE Region and will continue with a SPOE region February 1, 2006. A SPOE is considered as 'existing' even if the counties they serve will be different or modified. If a SPOE is changing its tax ID number, the SPOE will have a new enrollment with the CFO, and is considered "New."

(3) Discontinued: any current SPOE that serves a designated SPOE Region currently but will not provide service after January 31, 2006. This would include SPOEs that will be continuing February 1, but who are changing tax ID numbers.

B. 'Turning off' timeline of mofirststeps.com and the old SPOE software

The following schedule will apply to mofirststeps.com and the old SPOE software:

January 27, 2006 – at the end of the day, no later than 5 p.m., all SPOEs with copies of the old SPOE software will be required to complete an 'End of Day' communication with the CFO for every SPOE parent computer you have, regardless of whether all children have been transferred to the web system. Please use the rule of thumb, "If in doubt – do an end of day communication" with the CFO. **This does not apply to the Phase I SPOEs.**

The CFO will not allow the old SPOE software to communicate with the CFO again until February 6, 2006. **This applies to the Phase I SPOEs**

January 27, 2006 – at 5:30 p.m. the CFO will ‘take down’ mofirststeps.com. This includes the online claims submissions area – Provider Account Management, the Early Intervention/IFSP section - Child Care Management – everything. The entire site will be unavailable until February 6, 2006. **This applies to the Phase I SPOEs.**

C. ‘Turning on’ timeline of mofirststeps.com and the old SPOE software

February 6, 2006 – Computer machines with the old SPOE software will be able to communicate and perform end of day communication with the CFO. This applies to Phase I and Phase II SPOEs.

February 6, 2006 – mofirststeps.com will be available for use. Please note: it is possible mofirststeps.com will be ‘turned on’ and available prior to February 6. However, this should only be considered ‘possible’. Please do not plan to access mofirststeps.com (MOFS.com) during this time period. If the site is available for use earlier than February 6, 2006 a notification will be posted within the Communications section of MOFS.com. **This applies to Phase I and Phase II SPOEs.**

D. CFO Help Desk availability from 1/27 – 2/6

The CFO Help Desk will be available for questions and help during this time period. Some help may be limited due to the Help Desk being unable to access MOFS.com, however, the Help Desk will operate normally during this time period. The CFO Help Desk should be considered a SPOE’s primary point of contact for enrollment and software issues during the transition period. The Help Desk contact number will continue to be 866-711-2573.

E. SPOE and SPOE employees’ enrollment with the CFO

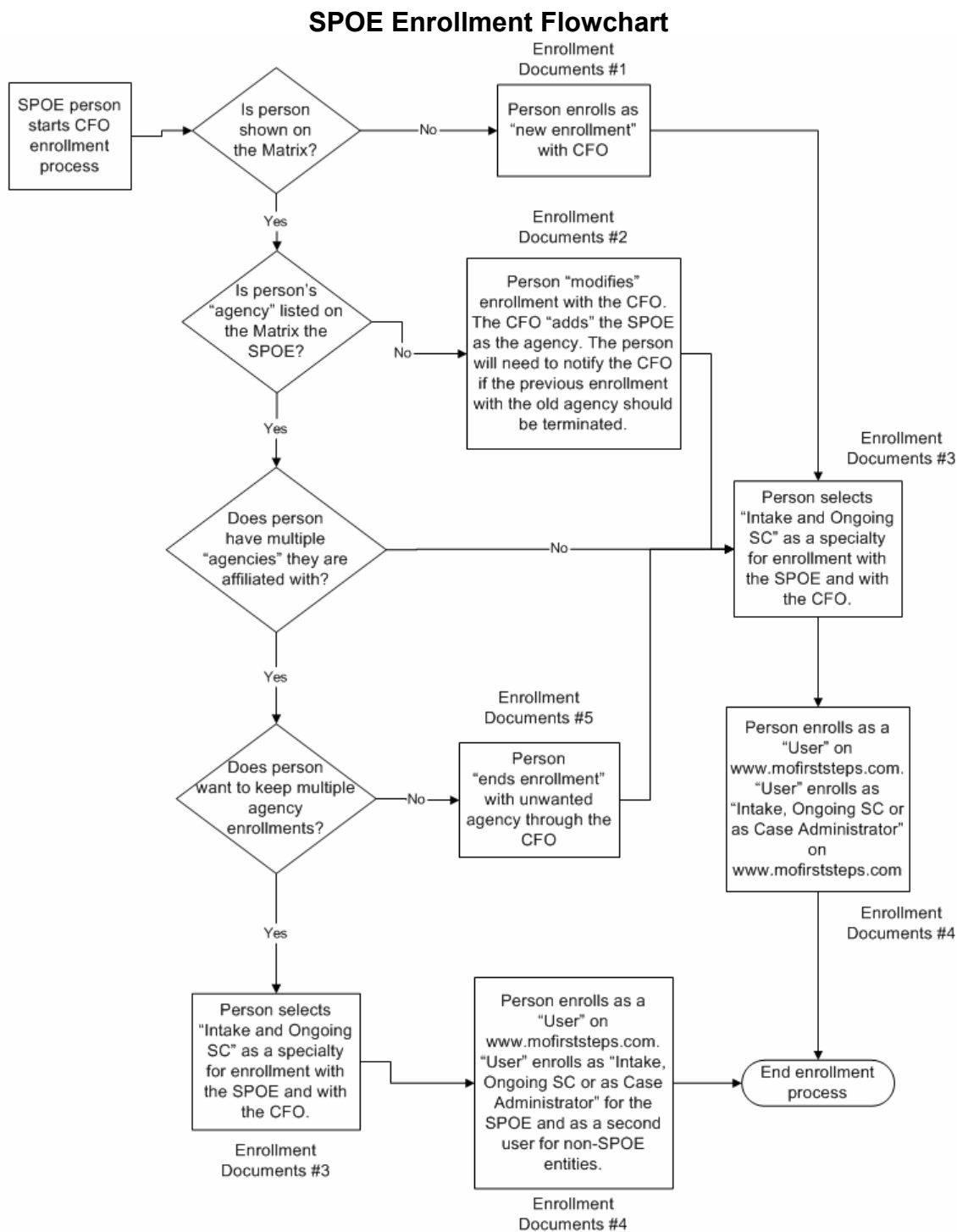
All SPOE personnel that perform intake or ongoing service coordination activities and SPOE managerial functions within First Steps will be required to be enrolled with the CFO. Enrollment with the CFO will need to be successfully completed prior to **January 13, 2006**, to the extent that staff have been identified.

Due to the possibility of SPOEs being reimbursed for specific claims by the CFO most of the enrollment documentation required of direct service providers is also a required component of SPOE personnel enrollment.

The CFO Provider/Payee Agreement outlines background checks that must be completed for successful CFO enrollment. Backgrounds checks are not a required component of successful SPOE enrollments with the CFO and background checks will not be required for successful enrollment with the CFO. SPOE personnel standards are outlined within separate documentation/agreements between DESE and the individual SPOEs. If SPOEs wish to submit background checks on staff at the time of enrollment they may.

Multiple SPOE enrollment types exist across the State. Some SPOE enrollment information must be updated. (Some SPOE personnel are enrolled with the CFO; some are not enrolled and some are enrolled multiple times). Due to this situation a flowchart has been included that may help to address the general questions that exist and what documentation needs to be completed. It is included below:

(1) This flowchart assumes that the new or existing SPOE is successfully enrolled with the CFO and identifies / defines the different enrollment types.



The various **Enrollment Document Groups** are itemized below and correspond to the "Enrollment Documents # x" in the above Flowchart. *NOTE:* some documents will be listed in multiple groups.

(2) Enrollment Document Group #1 (see above flow chart)

The following documentation will need to be completed by the SPOEs for each individual:

- CFO Provider Information Form
- CFO Provider/Payee Agreement
- Lobbying, Debarment and Suspension Form
- Medicaid/Medicare Provider Information

Each SPOE Agency will be required to complete:

- W-9
- EFT/Direct Deposit Authorization
- CFO Provider/Payee Agreement

(3) Enrollment Document Group # 2 (see above flow chart)

The following documentation will need to be completed by the SPOEs for each individual:

- CFO Provider Information Form
- CFO Provider/Payee Agreement
- Lobbying, Debarment and Suspension Form
- Medicaid/Medicare Provider Information

Each SPOE Agency will be required to complete:

- W-9
- EFT/Direct Deposit Authorization
- CFO Provider/Payee Agreement

(4) Enrollment Document Group # 3 (see above flow chart)

The following documentation will need to be completed by the SPOEs for each individual:

- CFO Provider Information Form

A fictional example is below:

Provider Information

Please complete this form using the organization information or your information if you are an Independent provider.
If you are currently enrolled, please provide the information currently in the CFO system. Send completed form to the address at the top.

Payee Federal Tax Id Number: **12-3456789** Payee/Facility Name: **Company INC.**
 First Name: **Good** M: **I.** Last Name: **Coordinator** Email: **good@evergreen.com**
 Site Address (services are performed here) **123 Main**
 City: **St. Louis** State: **MO** Zip: **12345**
 Phone: **(123) 123 1234** EXT: **123** Fax: **(123) 123. 1235**
 Name Of Primary Contact for Enrollment Questions: **Marcia Smith**

Billing Information

☒ **New Information**
☐ **Change of Information**
 Please indicate the type of change: ___ Specialty ___ Name ___ Phone ___ Fax ___ Address ___ Site ___ Billing
 ___ Dis-Enrolling: Last Date Of Work ___ / ___ / ___ Re-Enrollment Facility ___ Re-Enrollment Independent
 Payee/Facility Name: **Region SPOE**
 Provider Name: **Good Coordinator**
 Billing Address: **P.O. Box 123**
 City: **Chesterfield** State: **MO** ZIP: **45678**
 Phone: **(123) 123. 1234** EXT: **123** Fax: **(123) 123 - 1235**
 Are you currently enrolled by the First Steps system as an Early Intervention practitioner? ☒ No ___ Yes
 If yes, how are you currently enrolled? ___ Independently ___ With a Facility ___ Both

Early Intervention Discipline Please select one of the following service types indicating the designation for your enrollment.

<input type="checkbox"/> ABA Provider	<input type="checkbox"/> Occupational Therapy Assistant (COTA) Certified	<input type="checkbox"/> Psychologist
<input type="checkbox"/> ABA Implementer	<input type="checkbox"/> Occupational Therapist	<input checked="" type="checkbox"/> Service Coordinator
<input type="checkbox"/> Assistive Technology Provider	<input type="checkbox"/> Optometrist	<input type="checkbox"/> Service Coordinator - DMH
<input type="checkbox"/> Audiologist	<input type="checkbox"/> Ophthalmologist	<input type="checkbox"/> Social Worker
<input type="checkbox"/> Counselor	<input type="checkbox"/> Orientation/Mobility Specialist	<input type="checkbox"/> Special Instructor/Developmental Therapist
<input type="checkbox"/> Dietitian	<input type="checkbox"/> Paraprofessional in Early Intervention	<input type="checkbox"/> Speech Pathologist
<input type="checkbox"/> Foreign Language Translator	<input type="checkbox"/> Parent/Adult or for Hearing Impairments	<input type="checkbox"/> Speech Pathologist Associate
<input checked="" type="checkbox"/> Intake Coordinator	<input type="checkbox"/> Parent/Adult or for Visual Impairments	<input type="checkbox"/> Transportation Provider
<input type="checkbox"/> Interpreters for the Deaf	<input type="checkbox"/> Physical Therapist	<input type="checkbox"/> Family Member
<input type="checkbox"/> Nurse (Licensed Practical Nurse)	<input type="checkbox"/> Physical Therapy Assistant (PTA)	
<input type="checkbox"/> Nurse (Registered)	<input type="checkbox"/> Physician	
<input type="checkbox"/> Other (Please Specify)		

Please be aware that you may not provide services until you are listed as a provider on the Service Matrix (<http://missouri.eikids.com>). If you are requesting a change in status (i.e. from COTA to OT, etc.) that requires supporting documentation (Degree, License, etc), please attach the documentation to this form. If you are requesting a change in payee name or individual name please complete a W-9 form available on the website and submit it to our office with this form. Provider status will be updated upon the receipt of completed agreements. The date the information is received at the CFO office will determine the effective date of your provider status.

Signature: Signature Date: 2/15/2005

The Missouri Personnel Standards for Early Intervention Providers can be downloaded from the Internet at
<http://www.dese.state.mo.us/diuseped/FirstSteps/ProviderInfo.htm>

You will notice that each individual SPOE employee will enroll as two different specialties – an “Intake Coordinator” and as a “Service Coordinator”.

Since SPOE personnel are being enrolled as ongoing service coordinators they will be subject to the same rules on the matrix as the current independent service coordinators. SPOE employees will need to ‘update’ their individual matrix at least once every 6 months. If this information is not updated the SPOE will not be able to have AT authorizations created with the SPOE as the ‘payee’.

(5) Enrollment Document Group # 4 (see above flow chart)

The following documentation will need to be completed by the SPOEs for each individual:

- User Online Access Request
- E-Signature
- Certification for Online Claims

Each SPOE Agency will be required to complete:

- E-Signature
- User Online Access Request
- Certification for Online Claims

(6) Enrollment Document Group # 5 (see above flow chart)

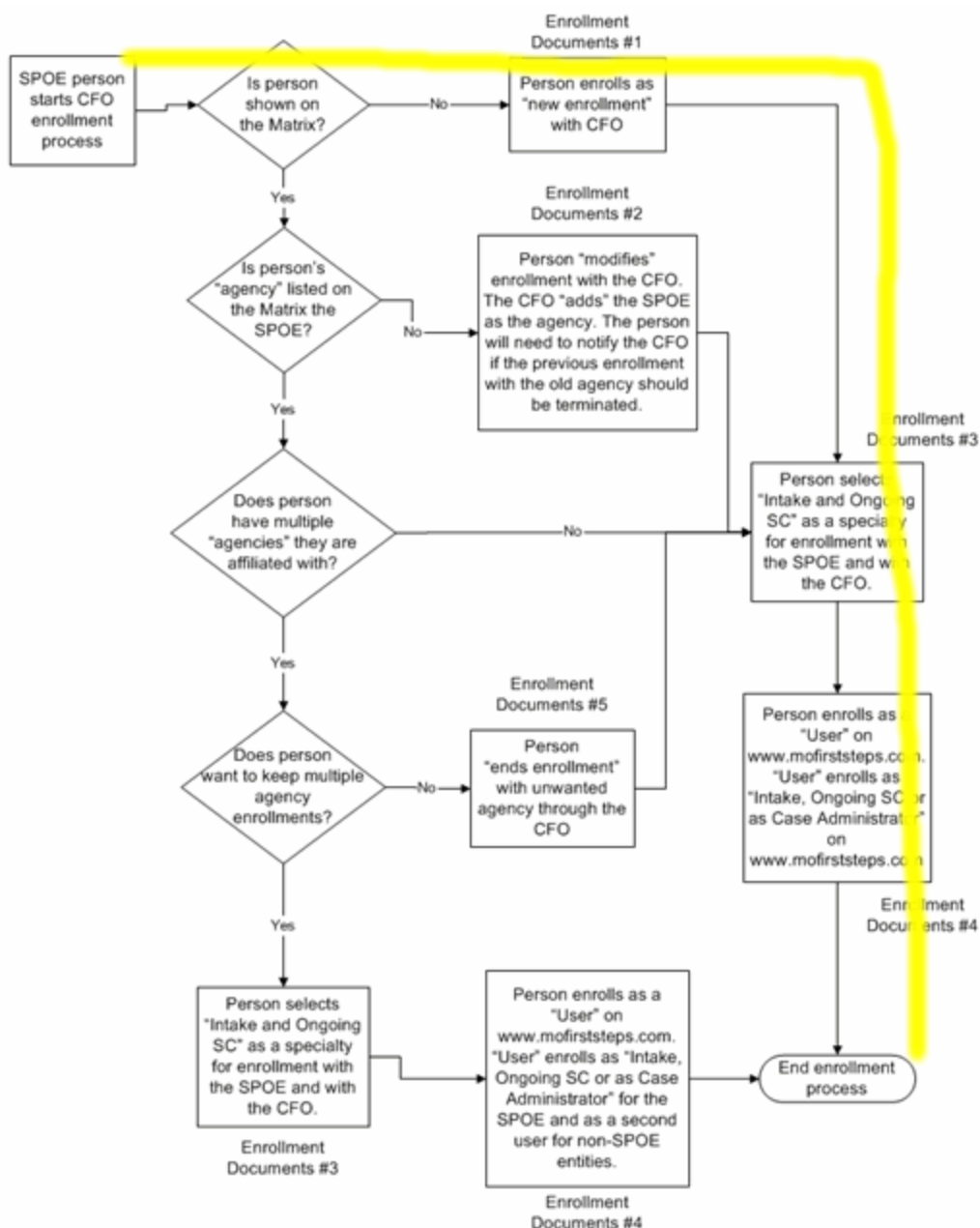
The following documentation will need to be completed by the SPOEs for each individual:

- CFO Provider Information Form

(7) Sample Enrollment Documentation

The following includes two examples and the required enrollment documentation for each example.

EXAMPLE 1: The SPOE and the SPOE personnel are not enrolled with the CFO. The “path” would be the following:



For Example 1 above, the total enrollment documentation would include:

The following documentation will need to be completed for each individual:

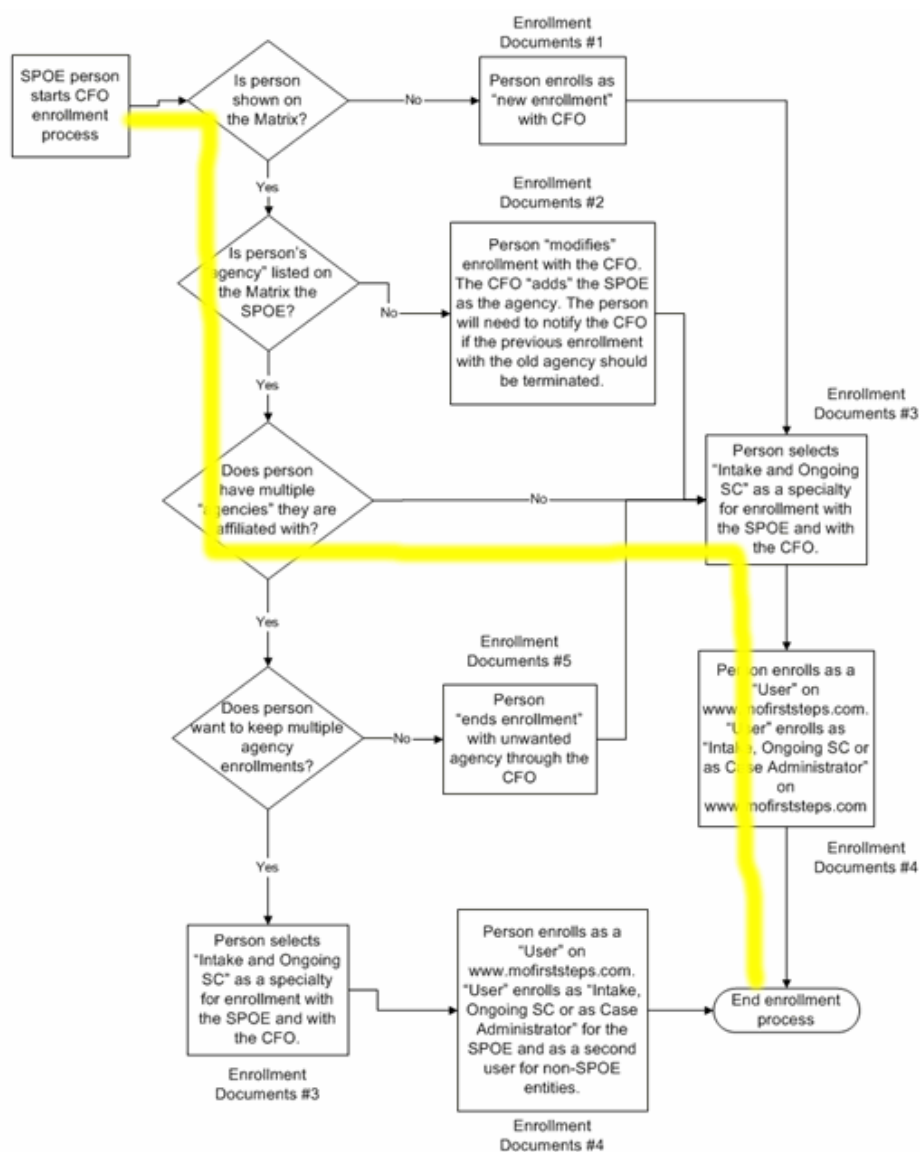
- CFO Provider Information Form
- CFO Provider/Payee Agreement

- Lobbying, Debarment and Suspension Form
- Medicaid/Medicare Provider Information
- User Online Access Request
- E-Signature
- Certification for Online Claims

The SPOE Agency will be – one time - required to complete:

- W-9
- EFT/Direct Deposit Authorization
- CFO Provider/Payee Agreement
- User Online Access Request
- E-Signature
- Certification for Online Claims

EXAMPLE 2: The SPOE is enrolled with the CFO and the SPOE employees' specialty is "Service Coordinator". The "path" would involve the following:



For Example 2 above, the total enrollment documentation would include:

The following documentation will need to be completed for each individual:

- CFO Provider Information Form
- User Online Access Request
- E-Signature
- Certification for Online Claims

The SPOE Agency will be – one time - required to complete:

- User Online Access Request
- E-Signature
- Certification for Online Claims

Other enrollment variations may exist. As questions concerning those emerge please contact the Help Desk for further guidance.

Please complete the required enrollment documentation and send to the CFO at:

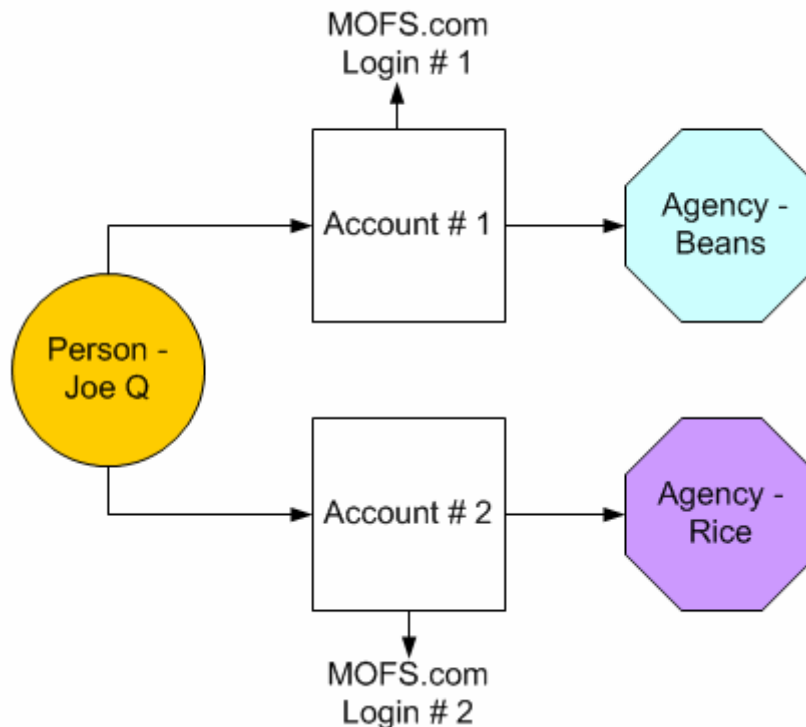
CFO Provider Enrollment
Attn: Provider Enrollment, Covansys
P.O. Box 29134
Shawnee Mission, KS 66201-9134

Phone: 866-711-2573 Option 2

F. How are MOFS.com logins affected?

Non-SPOE user logins will be unaffected. For SPOE user logins to MOFS.com - the answer will depend on numerous factors. A little background information will be helpful to understand the nature of MOFS.com logins and why – or why won't – they need to be changed.

Logins to MOFS.com represent a union of two factors. The factors are: a) the individual person b) the individual agency. These factors compose a CFO 'account'. If one of these two factors changes it requires a different login to MOFS.com. This is represented by the image below:



It is **important** to understand your SPOE staff login needs. Delays and errors may have large effects on SPOE staff and their ability to perform their work. Some of the more common situations are discussed within this Guide; however, *early* verification and communication with the CFO and DESE is highly encouraged in order to minimize areas of potential problems.

(1) My staff has MOFS.com logins

How did your staff apply for MOFS.com logins? Does the login apply to **the new/continuing** SPOE or some other agency? Which option below did your staff select for MOFS.com access?

<input type="checkbox"/>	Intake Coordinator
<input type="checkbox"/>	Family Service Coordinator (Intake and Ongoing SC)
<input type="checkbox"/>	Ongoing Service Coordinator (Independent or DMH)

During MOFS.com login enrollment – the CFO encouraged the SPOE intake **and** ongoing service coordinators to apply as a “Family Service Coordinator (Intake and Ongoing SC)”. Some SPOE personnel only chose “Intake Coordinator”. For the SPOE Re-Org, all SPOE service coordinators need to be classified as a Family Service Coordinator and at least one SPOE personnel designated as the SPOE ‘Administrator’.

The only exception to this will be if a SPOE staff member only performs the duties of an Intake Coordinator. If your staff selected “Intake Coordinator” for their MOFS.com login – those people will be unable to perform as an ongoing service coordinator on behalf of their SPOE until their MOFS.com login is changed.

Also, the MOFS.com logins of the SPOE staff have to be with the CFO 'account' attached to the SPOE. If their login is attached with another agency – their MOFS.com login must be modified. If the login isn't changed that staff member can not perform as an ongoing service coordinator on behalf of the SPOE or perform as an intake coordinator for that SPOE.

(2) My staff has MOFS.com logins. Some staff worked for DMH

It is possible that phase 2 SPOEs have staff that were once employed by DMH as an ongoing service coordinator. Please understand, the service coordinator's account **must** be created with the SPOE and the login must be attached to the SPOE. Moving from DMH to a SPOE and using the old DMH login will not work.

(3) My staff has MOFS.com login. Some staff were independents

It is possible that phase 2 SPOEs have staff that were once independent service coordinators. Please understand, the service coordinator's account **must** be created with the SPOE and the login must be attached to the SPOE. Moving from an independent service coordinator to a SPOE and using the old independent service coordinator login will not work.

(4) My staff has MOFS.com logins. Some staff worked for other SPOEs

It is possible that phase 2 SPOEs have staff that were once employed by other SPOE agencies. Please understand, the service coordinator's account **must** be created with the new SPOE and the login must be attached to the new SPOE. Moving from an old SPOE to a new SPOE and using the old SPOE login will not work.

(5) My SPOE provides service for multiple regions

How many MOFS.com logins do you and your staff have? If one SPOE agency covers multiple regions for First Steps – all applicable staff must have a separate login for each distinct SPOE region. One login will not cover multiple regions.

(6) Login Additions, Changes and Modifications

Basically, assuming you already have an 'account' and are enrolled with the old SPOE/agency with the CFO, you need to complete a couple of forms for your MOFS.com login. A couple of different 'scenarios' are listed in summary below:

1. Discontinue my login to MOFS.com
 - a. Please complete the "Online Access Enrollment Form" located here: <https://www.mofirststeps.com/UI/pdfs/OnlineEnrollmentForm.pdf>. You will need to complete the form and mark "Delete Access" on the form. A screen shot is shown below:

☐ **Change of Information:** Please indicate the type of change: ☐ **Delete Access***

2. Apply for a MOFS.com login with a new SPOE agency
 - a. Please complete the “Online Access Enrollment Form” located here:
<https://www.mofirststeps.com/UI/pdfs/OnlineEnrollmentForm.pdf>.
 - b. Please complete the “Electronic Signature Form” located here:
<https://www.mofirststeps.com/UI/pdfs/ElectronicSignatureRequest.pdf>.
 - c. Please complete the “Certification for Online Claims” located here:
<https://www.mofirststeps.com/UI/pdfs/AttestationStmt.pdf>.

(7) Current SPOE users and their MOFS access rights

Listed below are the current users and their access rights per SPOE agency. Please review this information and make any necessary changes including: modifying access, requesting new access and deleting access. *Note:* St. Louis County, Greater St. Louis and Northwest SPOEs are not included within this listing.

User	SPOE	Organization	MOFS Access
Randi Howard	2900	BFT Holding Corp (SPOE 2900)	Case Administrator
Kimberly Phelps	2900	BFT Holding Corp (SPOE 2900)	Family Service Coordinator
Maryjun A Ko	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Case Administrator
Shenee Mitchell	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Case Administrator
Barbara Renfro	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Intake Coordinator
Christin Townsend	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Intake Coordinator
Dawn McMorro	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Intake Coordinator
Helen Meats	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Intake Coordinator
Laura Walker	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Intake Coordinator
Lesley Smith	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Intake Coordinator
Orethia Tolson	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Intake Coordinator
Rachel Ball	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Intake Coordinator
Janice L Inman	1800	Child Advocacy Services Center, Inc (SPOE 1800)	Service Provider
Maryann Pabst	2000	Childcare Connection (SPOE 2000)	Case Administrator
Meagan Hevel	2000	Childcare Connection (SPOE 2000)	Case Administrator
Jodi Layman	2500	Childcare Connection (SPOE 2500)	Case Administrator
Maryann Pabst	2500	Childcare Connection (SPOE 2500)	Family Service Coordinator
Valerie Lane	1900	Children's Therapy Center (SPOE 1900)	Case Administrator
Vicki Young	1900	Children's Therapy Center (SPOE 1900)	Case Administrator
Amy Schawo	1900	Children's Therapy Center (SPOE 1900)	Intake Coordinator
Kathy Basler	1900	Children's Therapy Center (SPOE 1900)	Intake Coordinator
Linda Holland	1900	Children's Therapy Center (SPOE 1900)	None
Marianne Duchone	1900	Children's Therapy Center (SPOE 1900)	None
Laura Capps	1900	Children's Therapy Center (SPOE 1900)	Service Coordinator
Sonia Setzer	1900	Children's Therapy Center (SPOE 1900)	Service Coordinator
Courtney Winn	2200	Council of Churches of the Ozarks/ Childcare Resource Referral (SPOE 2200)	Case Administrator
Pamela Linder	2200	Council of Churches of the Ozarks/ Childcare Resource Referral (SPOE 2200)	Case Administrator
Tera Ward	2200	Council of Churches of the Ozarks/ Childcare Resource Referral (SPOE 2200)	Family Service Coordinator
Joyce Finley	2200	Council of Churches of the Ozarks/ Childcare Resource Referral (SPOE 2200)	Intake Coordinator
Courtney Winn	3100	Council of Churches of the Ozarks/ Childcare Resource Referral (SPOE 3100)	Case Administrator
Joyce Finley	3100	Council of Churches of the Ozarks/ Childcare Resource Referral (SPOE 3100)	Family Service Coordinator
Nicole Piper	3100	Council of Churches of the Ozarks/ Childcare Resource Referral (SPOE 3100)	None
Joyce Finley	3100	Council of Churches of the Ozarks/ Childcare Resource Referral (SPOE 3100)	Service Provider
Karen Jacobi	1700	Evergreen Behavioral Services (SPOE 1700)	Case Administrator
Sandy Whetmore	1700	Evergreen Behavioral Services (SPOE 1700)	Intake Coordinator
Kathy Willingham	1700	Evergreen Behavioral Services (SPOE 1700)	None
Patrick Finder	1700	Evergreen Behavioral Services (SPOE 1700)	None
Karen Jacobi	3300	Evergreen Behavioral Services (SPOE 3300)	Case Administrator
Sandy Whetmore	3300	Evergreen Behavioral Services (SPOE 3300)	Intake Coordinator

Kathy Willingham	3300	Evergreen Behavioral Services (SPOE 3300)	None
Patrick Finder	3300	Evergreen Behavioral Services (SPOE 3300)	None
Karen Jacobi	3400	Evergreen Behavioral Services (SPOE 3400)	Case Administrator
Sandy Whetmore	3400	Evergreen Behavioral Services (SPOE 3400)	Intake Coordinator
Tim Stewart	3400	Evergreen Behavioral Services (SPOE 3400)	Intake Coordinator
Kathy Willingham	3400	Evergreen Behavioral Services (SPOE 3400)	None
Patrick Finder	3400	Evergreen Behavioral Services (SPOE 3400)	None
Karen Jacobi	3500	Evergreen Behavioral Services (SPOE 3500)	Case Administrator
Ronda Admire	3500	Evergreen Behavioral Services (SPOE 3500)	Intake Coordinator
Tim Stewart	3500	Evergreen Behavioral Services (SPOE 3500)	Intake Coordinator
Kathy Willingham	3500	Evergreen Behavioral Services (SPOE 3500)	None
Patrick Finder	3500	Evergreen Behavioral Services (SPOE 3500)	None
Karen Jacobi	2800	Evergreen Behavioral Services, LLC (SPOE 2800)	Case Administrator
Ronda Admire	2800	Evergreen Behavioral Services, LLC (SPOE 2800)	Intake Coordinator
Tim Stewart	2800	Evergreen Behavioral Services, LLC (SPOE 2800)	Intake Coordinator
Kathy Willingham	2800	Evergreen Behavioral Services, LLC (SPOE 2800)	None
Patrick Finder	2800	Evergreen Behavioral Services, LLC (SPOE 2800)	None
Diana Patten	2600	First Steps For Families (SPOE 2600)	Case Administrator
Jennifer Larson	2600	First Steps For Families (SPOE 2600)	Family Service Coordinator
Jennifer Larson	2600	First Steps For Families (SPOE 2600)	None
Diana Patten	2600	First Steps For Families (SPOE 2600)	Service Coordinator
Jannette Deatherage	2600	First Steps For Families (SPOE 2600)	Service Coordinator
Joyce Marshall	2600	First Steps For Families (SPOE 2600)	Service Coordinator
Stacey Connell	2600	First Steps For Families (SPOE 2600)	Service Coordinator
Susan Waxman	2600	First Steps For Families (SPOE 2600)	Service Coordinator
Gretchen Gambon	2100	Jasper County Sheltered Facilities Association, Inc. (SPOE 2100)	Case Administrator
Jennifer Yerington	2100	Jasper County Sheltered Facilities Association, Inc. (SPOE 2100)	Case Administrator
Jana Robinson	2100	Jasper County Sheltered Facilities Association, Inc. (SPOE 2100)	Family Service Coordinator
Kathy Bynum	2100	Jasper County Sheltered Facilities Association, Inc. (SPOE 2100)	Family Service Coordinator
Rachel Terbrock	2100	Jasper County Sheltered Facilities Association, Inc. (SPOE 2100)	None
Becky Taggart	2100	Jasper County Sheltered Facilities Association, Inc. (SPOE 2100)	Service Coordinator
Karla Evans	2100	Jasper County Sheltered Facilities Association, Inc. (SPOE 2100)	Service Coordinator
Becky Johnson	1500	Southeast Missouri State University (SPOE 1500)	Case Administrator
Nancy Hale	1500	Southeast Missouri State University (SPOE 1500)	Case Administrator
Susan Cockerill	1500	Southeast Missouri State University (SPOE 1500)	Case Administrator
Nancy Hale	1500	Southeast Missouri State University (SPOE 1500)	Family Service Coordinator
Mary Oglesby	1500	Southeast Missouri State University (SPOE 1500)	Intake Coordinator
Lindsay Moore	1500	Southeast Missouri State University (SPOE 1500)	None
Becky Johnson	3600	Southeast Missouri State University (SPOE 3600)	Case Administrator
Nancy Hale	3600	Southeast Missouri State University (SPOE 3600)	Case Administrator
Mary Oglesby	3600	Southeast Missouri State University (SPOE 3600)	Intake Coordinator
Theresa Robson	3600	Southeast Missouri State University (SPOE 3600)	Intake Coordinator
Lindsay Moore	3600	Southeast Missouri State University (SPOE 3600)	None

If any MOFS access needs to be adjusted above please submit an updated Online Access Form and complete the necessary modifications.

If you are a new SPOE the SPOE agency will need to enroll with the CFO. Listed below is the process to enroll the SPOE with the CFO.

3. NEW SPOE'S

New SPOE agencies have to complete the following steps in order to access the CFO system. Keep in mind that "New" SPOE **includes those existing SPOEs that will be changing tax ID numbers.** These steps are based around a couple of distinct areas:

1. Enrollment with the CFO
2. MOFS.com access
3. Old SPOE software installation

This Guide is designed provide a step-by-step guide to insure all steps are being completed and to provide an easy reference.

A. Enrollment with the CFO

Please refer to “SPOE and SPOE Employees Enrollment with the CFO”. All enrollment with the CFO must be successfully completed by January 16, 2006.

B. MOFS.com access

By February 1, 2006 all SPOE staff members should receive their logins to MOFS.com. If it is not received by then please contact the Help Desk.

On February 6, 2006 the SPOE administrator will need to log into MOFS.com and assign intake and ongoing service coordinators to the kids in their region within MOFS.com.

Please understand, you will not need to re-assign new SPOE ongoing service coordinators to those children that have been previously assigned DMH service coordinators within your region. The CFO will not end the DMH ongoing service coordination assignments within MOFS.com; however ALL independent service coordination assignments will be ended by the CFO, even if an independent service coordinator will be employed by the SPOE. The CFO recommends that the SPOE administrators review the children on DESE’s excel spreadsheet to insure that all First Steps participants within their regions have ongoing service coordinators assigned.

C. Old SPOE software installation

By **February 1, 2006** you must install **one** copy of the old SPOE software within your SPOE. Only one copy is necessary. The old SPOE software database will be blank. Once you communicate with the CFO the CFO will ‘download’ all the necessary information to your old SPOE software through the internet. Please make certain you have a copy of the old SPOE program and any updates necessary to that software before February 1, 2006.

Please note: the single copy of the old SPOE software will act as the ‘parent’ computer for the old SPOE software. ‘Child’ copies of the old SPOE software will not need to be present and will not be used.

D. New SPOE Checklist

The following checklist is provided in order to help guide you through the CFO process. All of these steps are *highly* recommended be followed within the outlined time period.

Completed?	Step	Action	Action Due Date
	1	Enroll the SPOE and the SPOE staff with the CFO. All MOFS.com login applications and enrollment documentation should be completed and sent to the CFO.	1/13/2006
	2	Obtain a copy of the old SPOE software and any necessary SPOE software releases from the CFO. Configure the old SPOE software to reflect your new SPOE software identification. Obtain this information from the CFO Help Desk.	1/20/2006
	3	Obtain the Excel spreadsheet of your SPOE's First Steps caseload from DESE. Assign the SPOE intake and ongoing service coordinators to the Excel spreadsheet's caseload.	1/23/2006
	4	Obtain MOFS.com logins for all staff. Double check your staff has been assigned the correct access to MOFS.com by verifying the paper MOFS.com login applications – "User Online Access Request" forms.	2/1/2006
	5	Verify all internet connectivity of all SPOE employees	2/1/2006
	6	The SPOE Case Administrator logs into MOFS.com and assigns intake and ongoing service coordinators to the children on MOFS.com. Verify all children from DESE's Excel spreadsheet has been accounted for on MOFS.com or within the old SPOE software. Note: children in MOFS.com assigned DMH service coordinators will not need to be reassigned unless it is under the discretion of the SPOE.	2/6/2006
	7	Check kids referred through MOFS.com. Process incoming referrals.	2/6/2006
	8	Enter manual, paper referrals into MOFS.com. Assign intake coordinators to referrals	2/6/2006
	9	Review upcoming meetings scheduled on MOFS.com and for those kids in the old SPOE software.	2/6/2006
	10	Configure the old SPOE software to reflect your new SPOE identification. Obtain this information from the CFO Help Desk. Use the old SPOE software to 'communicate' with the CFO.	2/6/2006
	11	Report any discrepancies to CFO Help Desk.	2/6/2006

4. EXISTING SPOE'S

Existing SPOEs that may or may not have their SPOE service area changed must follow a slightly different path for the process that occurs 1/27 – 2/6/2005. **Keep in mind that if an existing SPOE is changing tax ID numbers, that SPOE is considered both a discontinuing AND a new SPOE.**

A. MOFS.com Access

Have you hired any new staff?

Do all your staff have MOFS.com logins and do the logins correspond to your specific SPOE?

Do you have any new support personnel?

Have any personnel discontinued service with your SPOE?

Review all of your personnel and their MOFS.com access and make adjustments where necessary.

On **February 6, 2006** the SPOE administrator will need to log into MOFS.com and assign intake and ongoing service coordinators to the kids in their region within MOFS.com.

Please understand you will not need to re-assign new SPOE ongoing service coordinators to those children that have been previously assigned DMH service coordinators within your region. The CFO will not end the DMH ongoing service coordination assignments within MOFS.com; however ALL independent service coordination assignments will be ended by the CFO, even if an independent service coordinator will be employed by the SPOE. The CFO recommends that the SPOE administrators review the children on DESE's excel spreadsheet to insure that all First Steps participants within their regions have ongoing service coordinators assigned.

B. Old SPOE Software

All Phase 2 SPOEs will have different "SPOE ID" numbers with the CFO. You will be required to provide copies of all SPOE software databases to the CFO on January 30, 2006. These database copies include all child machines and the parent machine regardless of whether the machines are still being used or not. On **January 30, 2006** the SPOE will contact the CFO Help Desk for instructions about transferring a copy of these databases to the CFO.

Assuming your SPOE has been awarded a SPOE re-bid please keep one copy of the old SPOE software at your SPOE. This will become the new parent machine for the old SPOE software. When you communicate with the old SPOE software on **February 6, 2006** the CFO will overwrite the old SPOE database copy and install a new, re-configured SPOE database copy. This copy will include the children in the region and counties that your new SPOE services. Please insure that your old SPOE software has been assigned the new SPOE ID for your SPOE region. This number may be obtained from the Help Desk.

Please understand – all of your old SPOE software data will need to be overwritten and removed from your machine. If you do not complete this step – your old SPOE software will contain copies of any kids in old regions and the new regions. Please discuss with the Help Desk the steps you will need to take to remove the old database from the old SPOE software and insure this step has been completed before you communicate with the CFO on **February 6, 2006**.

C. Existing SPOE Checklist

This checklist is built under the assumption you are an existing SPOE and have been awarded a new SPOE region.

Completed?	Step	Action	Action Due Date
	1	Enroll applicable SPOE staff with the CFO. All MOFS.com login applications and enrollment documentation should be completed and sent to the CFO. End the MOFS.com logins of any staff no longer employed by the SPOE.	1/13/2006
	2	Obtain an Excel spreadsheet of your SPOE's First Steps caseload from DESE. Assign the SPOE staff to the Excel spreadsheet caseload.	1/23/2006
	3	Complete the final old SPOE parent computer 'end of day' communication with the CFO.	1/27/2006
	4	Send copies of all old SPOE software databases to the CFO.	1/30/2006
	5	Uninstall all old 'child' SPOE software instances after confirmation has been obtained by from the Help Desk of successful receipt of your database copies.	1/30/2006
	6	Verify receipt of MOFS.com logins for applicable staff. Double check your staff has been assigned the correct access to MOFS.com.	2/1/2006
	7	Check/verify internet connectivity of all SPOE employees	2/1/2006
	8	The SPOE Case Administrator logs into MOFS.com and assigns intake and ongoing service coordinators to the children on MOFS.com. Verify all children from DESE's Excel spreadsheet has been accounted for on MOFS.com or within the old SPOE software. Note: children in MOFS.com assigned DMH service coordinators will not need to be reassigned unless it is at the discretion of the SPOE.	2/6/2006
	9	Check kids referred through MOFS.com. Process incoming referrals.	2/6/2006
	10	Enter manual, paper referrals into MOFS.com. Assign intake coordinators to referrals	2/6/2006
	11	Review upcoming meetings scheduled on MOFS.com and for those kids in the old SPOE software.	2/6/2006
	12	All of your old SPOE software data will need to be overwritten and removed from your 'parent' machine. If you do not complete this step – your old SPOE software will contain copies of any kids in old regions and the new regions. Please <u>discuss with the Help Desk the steps you will need to take to remove the old database from the old SPOE software</u> and insure this step has been completed <u>before</u> you communicate with the CFO. Make certain you install the 'new SPOE ID' into the old SPOE software prior to communications with the old SPOE software.	2/6/2006
	13	Configure the old SPOE software to reflect your new SPOE identification. Use the old SPOE software to 'communicate' with the CFO.	2/6/2006
	14	Report any discrepancies to CFO Help Desk.	2/6/2006

5. DISCONTINUED SPOE'S

Those SPOE agencies that will not be serving First Steps in the SPOE capacity after February 1, 2006 will need to take the actions outlined within this document.

A. MOFS.com Access

Please file a “delete access” request of the MOFS User Online Access Form for each SPOE personnel at your agency.

B. Old SPOE Software

You will be required to provide copies of the old SPOE software databases to the CFO on **January 30, 2006**. These copies include all child machines and the parent machine regardless of whether the machines are still being used or not. **On January 30, 2006 the SPOE will contact the CFO Help Desk** for instructions about transferring a copy of these databases to the CFO.

Once the copies of the old SPOE database have been sent to the CFO and you have received confirmation of receipt please uninstall all copies of the old SPOE software program from your computers.

C. Discontinued SPOE Checklist

Completed?	Step	Action	Action Due Date
	1	Complete the final old SPOE parent computer 'end of day' communication with the CFO.	1/27/2006
	2	Send copies of all old SPOE software databases to the CFO. Verify that the CFO Help Desk has received all database copies.	1/30/2006
	3	Uninstall all old 'child' and 'parent' SPOE software instances after confirmation has been obtained by from the Help Desk of successful receipt of your database copies.	1/30/2006
	4	Please delete your access to MOFS.com by submitting an updated User Online Access Form. All documentation should be completed and sent to the CFO.	2/1/2006
	5	Report any discrepancies to the CFO Help Desk.	2/1/2006

6. FREQUENTLY ASKED QUESTIONS

A. Why should the SPOE complete the Certification for Online Claims, W-9, EFT, etc.?

Whether or not your SPOE may/will submit claims to the CFO is predicated by agreements and/or directives from DESE. It is the *possibility* of Phase 2 SPOEs submitting claims at a future date that dictates the need for these types of enrollment documents.

B. I am enrolled with the CFO already with another agency. Do I need to also enroll with the new SPOE?

Yes.

C. What do I complete for the User Online Access Request? What kind of access do I need to enroll as a user?

Access is controlled by the elections completed to the following form – the User Online Access Request. It is displayed below:

MOFirstSteps.com Online Access Enrollment Form

Agency/Billing Entity Information – Please Print (Please keep a copy for your records.)

Please complete all fields on this form. If you are enrolled with the CFO, please provide the information currently on file with the CFO. Complete, sign and mail this form to: Central Finance Office c/o Covansys P.O. Box 29134 Shawnee Mission KS 66201-9134

Tax ID Number

SPOE/Agency/Billing Entity _____ **SPOE/Agency Name** _____

Agency Administrator, SPOE personnel or Independent Provider Information:

First Name: _____ **Last Name:** _____ **Email:** _____

Address _____ **City:** _____ **State:** _____ **Zip:** _____

Phone: () _____ **EXT:** _____

Primary Contact for Questions: _____ **Phone Number:** () _____

User Information - Please Print

☐ **New User Information:** Select One: ☐ **Currently Enrolled First Steps Provider** ☐ **Other User**

☐ **Change of Information:** Please indicate the type of change: ☐ **Delete Access*** ☐ **Modify Access****

User First and Last Name: _____ **Email***:** _____

Please select a User ID and Security Word. The User ID and Password will be used to log into the web system. User ID's may not be duplicated, please submit a second choice to be used if choice one is not available. The Security Word is used for user identification /verification and will be needed to gain initial access online. This word can be anything (i.e. Mothers maiden name, pet's name) up to 20 characters max. This word will be required when contacting the CFO for user access. This is not the Password. We highly recommend the usage of your Service Matrix User ID (if applicable)

User ID: 1. _____ 2. _____ **Security Word:** _____

Social Security Number: _____ **Phone:** () _____ **EXT:** _____

**Deleting Online Access does not end the Provider's enrollment with the CFO*

*** If this form is used to Modify Access – the access marked on this form will be the only access available to the user.*

**** The email address must be unique per user*

User Access Description

Please select one of the following types (please see the following page for access descriptions). Please review the access permissions list carefully.

<input type="checkbox"/> Independent Provider/Provider Administrator	<input type="checkbox"/> Intake Coordinator
<input type="checkbox"/> Agency Administrator	<input type="checkbox"/> Family Service Coordinator (Intake and Ongoing SC)
<input type="checkbox"/> Agency Provider – Non-Billing Provider	<input type="checkbox"/> Ongoing Service Coordinator (Independent or DMH)
<input type="checkbox"/> Agency Provider - Billing	<input type="checkbox"/> Agency Claims and Billing
<input type="checkbox"/> Case Administrator	<input type="checkbox"/> Third Party Billing (Clearinghouse)

User Signature: _____ **Date** _____

Administrator Signature: _____ **Date** _____

The date the information is received and processed at the CFO office will determine the effective date of online access. An email will be sent to the user's email address with further directions on how to access the online system.

User Online Access Request

(1) If the SPOE employee acts as the “SPOE Director” the following access mark will be checked on the User Online Access Request:

User Access Description

Please select one of the following types (please see the following page for access descriptions). Please review the access permissions list carefully.

<input type="checkbox"/>	Independent Provider/Provider Administrator	<input type="checkbox"/>	Intake Coordinator
<input type="checkbox"/>	Agency Administrator	<input type="checkbox"/>	Family Service Coordinator (Intake and Ongoing SC)
<input type="checkbox"/>	Agency Provider – Non-Billing Provider	<input type="checkbox"/>	Ongoing Service Coordinator (Independent or DMH)
<input type="checkbox"/>	Agency Provider - Billing	<input type="checkbox"/>	Agency Claims and Billing
<input checked="" type="checkbox"/>	Case Administrator	<input type="checkbox"/>	Third Party Billing (Clearinghouse)

(2) If the SPOE employee acts as a “Family Service Coordinator” the following would be selected on the User Online Access Request. (Note: most SPOE employees should be marked this way):

User Access Description

Please select one of the following types (please see the following page for access descriptions). Please review the access permissions list carefully.

<input type="checkbox"/>	Independent Provider/Provider Administrator	<input type="checkbox"/>	Intake Coordinator
<input type="checkbox"/>	Agency Administrator	<input checked="" type="checkbox"/>	Family Service Coordinator (Intake and Ongoing SC)
<input type="checkbox"/>	Agency Provider – Non-Billing Provider	<input type="checkbox"/>	Ongoing Service Coordinator (Independent or DMH)
<input type="checkbox"/>	Agency Provider - Billing	<input type="checkbox"/>	Agency Claims and Billing
<input type="checkbox"/>	Case Administrator	<input type="checkbox"/>	Third Party Billing (Clearinghouse)

(3) If the SPOE employee acts as strictly an Intake Coordinator and may never be assigned ongoing service coordinator activities – the following would be selected on the User Online Access Request:

User Access Description

Please select one of the following types (please see the following page for access descriptions). Please review the access permissions list carefully.

<input type="checkbox"/>	Independent Provider/Provider Administrator	<input checked="" type="checkbox"/>	Intake Coordinator
<input type="checkbox"/>	Agency Administrator	<input type="checkbox"/>	Family Service Coordinator (Intake and Ongoing SC)
<input type="checkbox"/>	Agency Provider – Non-Billing Provider	<input type="checkbox"/>	Ongoing Service Coordinator (Independent or DMH)
<input type="checkbox"/>	Agency Provider - Billing	<input type="checkbox"/>	Agency Claims and Billing
<input type="checkbox"/>	Case Administrator	<input type="checkbox"/>	Third Party Billing (Clearinghouse)

(4) If a SPOE has support/administrative staff the only available selection in the system is to classify the support person as a “Case Administrator”.

D. Will discontinued SPOEs have access to MOFS after 1/27 to complete file updates, submit Case Notes, etc.?

No. If this information needs to be updated you will need to submit the information via paper to the new SPOE for their entry into MOFS.com.

E. I am already enrolled with the CFO – but I am not enrolled with the SPOE. Do I still need to complete this action?

Yes. You need to enroll with the SPOE.

Whether or not you maintain your separate relationship with the other agency is your decision. However, you will have two separate mofirststeps.com user IDs. One will be with the SPOE and the other will be as an independent/with the other agency. Your access rights will vary for each user ID. Each user ID could have different children assigned to the User ID.

F. May I have more than one “Case Administrator” per SPOE location?

Yes. This is *discouraged* but supported.

G. My SPOE is ‘existing’ and we are involved in Phase 2 re-org. Will we need to enroll and receive another, separate login to MOFS.com?

No. Your existing login will also work after the SPOE re-configuration *assuming your login is with the SPOE and the SPOE is not changing tax ID numbers, in which case it would be considered a new SPOE and all employees would need to enroll with the new SPOE.*

H. Does the SPOE need to discontinue previous service coordination authorizations for independent service coordinators?

No. Independent service coordinators will not be reimbursed any funds for claims submitted for dates of service after 2/1/2006. The authorizations may still be active and they may submit claims but the CFO will not reimburse these individuals any amounts for these claims for these dates of service.

7. ADDENDUM

A. DESE SPOE Transition Website

DESE is posting all listserv messages and other items regarding the transition to new SPOE regions/agencies at <http://dese.mo.gov/divspeced/FirstSteps/SPOEtransition.html>.

B. CFO Conference Calls

In an effort to provide clear and consistent information during the next couple of months Covansys will host question and answer sessions according to the following schedule.

If you wish to participate in the session please call 877-841-9268. It will ask for a participant code. Please enter 151754. This is a relatively open forum and you do not need to register to participate in this session and participation is not required. However, the SPOE administrator and/or designee are encouraged to attend these sessions.

Date	Time	Primary Subject Content*
1/10/2006	8:00 am - 9:00 am	SPOE enrollment and re-organization process
1/31/2006	8:00 am - 8:30 am	Re-organization process and status
2/10/2006	8:00 am - 8:30 am	Re-organization process and status
2/22/2006	8:00 am - 9:00 am	Cost Participation and private insurance
3/8/2006	8:00 am - 9:00 am	Cost Participation and private insurance
3/22/2006	8:00 am - 8:30 am	MOFS.com issues, releases and upcoming information
*This is the initial discussion topic. Other topics may be introduced as time and necessity dictate.		